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Techniques for Electronic Resource Management: Crowdsourcing for Best Practices

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**TERMS: Techniques for Electronic Resource Management:  
Crowdsourcing for Best Practices  
an ALCTS Preconference**

**June 28, 2013  
McCormick Place (MCP), room S403**

*TERMS: Techniques for Electronic Resource Management* has been a crowdsourcing experiment to get librarians from Europe and the U.S. to share their best practices and workflows of electronic resource management freely to interested librarians via social media venues such as Facebook, Twitter and Tumblr. You will be participating in the development of the next steps of capturing the best practices of electronic resources management

**Friday, June 28, 2013**

**7:30 – 8:00                    Registration & Breakfast**

**8:00 – 8:30                    Welcome & Introduction: Both Presenters**

Intro of speakers and delegates

Areas to choose from:

- e-book platform or package
- e-journal package
- database
- service, e.g. discovery tool
- journal archive

**8:30 – 10:00                Presentation 1 - TERMS 1 & 2/Jill Emery**

Overview TERMS1 (15 minutes)

*Handout: Appendix 2.1*

Small Group Hands-on activity (30 minutes)

Overview 15 minutes TERMS2

Small Group Hands-on activity (30 minutes)

**10:00 – 10:30              Morning Break**

**10:30 – 11:20              Presentation 2 - TERMS 3/Graham Stone**

Overview TERMS3 (20 minutes)

Small Group Hands-on Activity (30 minutes)

*Handout: Marketing matrix*

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- 11:20 – 11:40      **Morning Wrap-up:**
- Solicit feedback - how are the activities, any questions and further discussion
- 11:40 – 1:10      **Lunch** (1 hour 30 minutes)
- 1:10 – 2:05      **Presentation 3 - TERMS 4 & 5/Jill Emery**
- Overview TERMS4/5 25 minutes  
Small Group Hands-on Activity (30 minutes)  
*Handouts: fund report and ECR workflow*
- 2:05 – 2:50      **Presentation 4 - TERMS6/Graham Stone**
- Overview TERMS6 15 minutes  
Small Group Hands-on Activity (30 minutes)  
*Handout: Cancellation Workflow*
- 2:50 – 3:05      **Afternoon Break** (15 minutes)
- 3:05 – 3:50      **Workflow Developments**
- Introduction (5 minutes)  
Complete workflow (35 minutes)  
Final discussion (5 minutes)
- 3:50 – 4:00      **Wrap up/Questions: Both Speakers**
- 4:00      **Preconference Ends**

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**June 28, 2013  
McCormick Place (MCP), room S403**

**The program will be presented by:**

Jill Emery, Collection Development Librarian, Portland State University, Portland, OR

**Jill Emery** is the collection development librarian at Portland State University Library and has over seventeen years of academic library experience from various higher education institutions within the United States of America. She is a past-president of the North American Serials Interest Group (NASIG) and the social media specialist for the Electronic Resources & Libraries, LLC. Jill serves as a current member of the Charleston Advisor editorial board and is the columnist for "Heard on the Net." She recently joined the editorial board of *Insights*.

Graham Stone, Information Resources Manager, University of Huddersfield, Huddersfield, UK

**Graham Stone** is Information Resources Manager at the University of Huddersfield, responsibilities include the library information resources budget and management of the Acquisitions and Journals and E-Resources Teams. He also manages the University Repository and University of Huddersfield Press initiative. Graham has managed a number of Jisc funded projects including the Library Impact Data Project and the Huddersfield Open Access Publishing project. He is UKSG Publications Officer and member of the Insights journal editorial board, the Electronic Information Resources Working Group (EIRWG), the PALS metadata and interoperability working group, the OAPEN-UK Steering Group and chair of the Jisc Collections Journal Archives Advisory Board. He is currently undertaking a Doctor of Enterprise at the University of Huddersfield, which is looking at the viability of the University Press as an Open Access publisher.

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**Patron Driven Acquisition – supplier platform review**

**Product:**

**Company:**

**1. User Experience**

Ref no.	Requirement	Notes	Total	Score
1.1	Number of clicks from the Library Catalogue to reach full text			/10
1.2	How can the PDF be accessed? E.g. download, save copy and paste, print. What are the copyright vs. DRM restrictions?			/10
1.3	To what extent is the look and feel of the interface user friendly?			/10
1.4	How intuitive are the screens to navigate? E.g. between sections/chapters			/10

1.5	Ability to search in text		/10
1.6	Does the system enable the user to search at appropriate levels for their needs		/ 10
1.7	Is the platform interoperable with bibliographic software? Test against Endnote, RefWorks, Zotero, CiteULike		/10
1.8	Usability on mobile devices?		/10
		<b>Total as a percentage</b>	

## 2. Pricing model

Ref no.	Requirement	Notes	Total	Score
2.1	What are the licensing conditions and do they restrict potential access? E.g. simultaneous users, credits etc.			/ 10
2.2	Is there a minimum spend?			/ 10
2.3	What is the average cost per title by subject?			/10
2.4	How are the costs calculated? E.g. cost of catalogue record, are there any discounts?			/10
2.5	Estimate of staff costs			/10
		Total as a percentage		



### 3. Content

Ref no.	Requirement	Notes	Total	Score
3.1	How do the products compare on overall content of chosen subjects?			/ 10
3.2	What is the distribution of date of publication			/ 10
3.3	Are the most up to date editions available?			/ 10
3.4	What is the overlap with existing subscriptions? E.g. Ebrary, Safari, Books24X7			/ 10
		<b>Total as a percentage</b>		

#### 4. Administration

Ref no.	Requirement	Notes	Total	Score
4.1	How much set up time is required?			/ 10
4.2	How much flexibility is there in editing the profiles once set up? E.g. current ed. Only, ability to cap price, restrict by year, limits to subject, publisher or series			/10
4.3	How are additional titles/ deletions/ duplicates handled?			/10
4.4	How are invoices handled and monitored?			/10
4.5	What methods are in place to check access? How easy is this to do in house?			/10
		Total as a percentage		

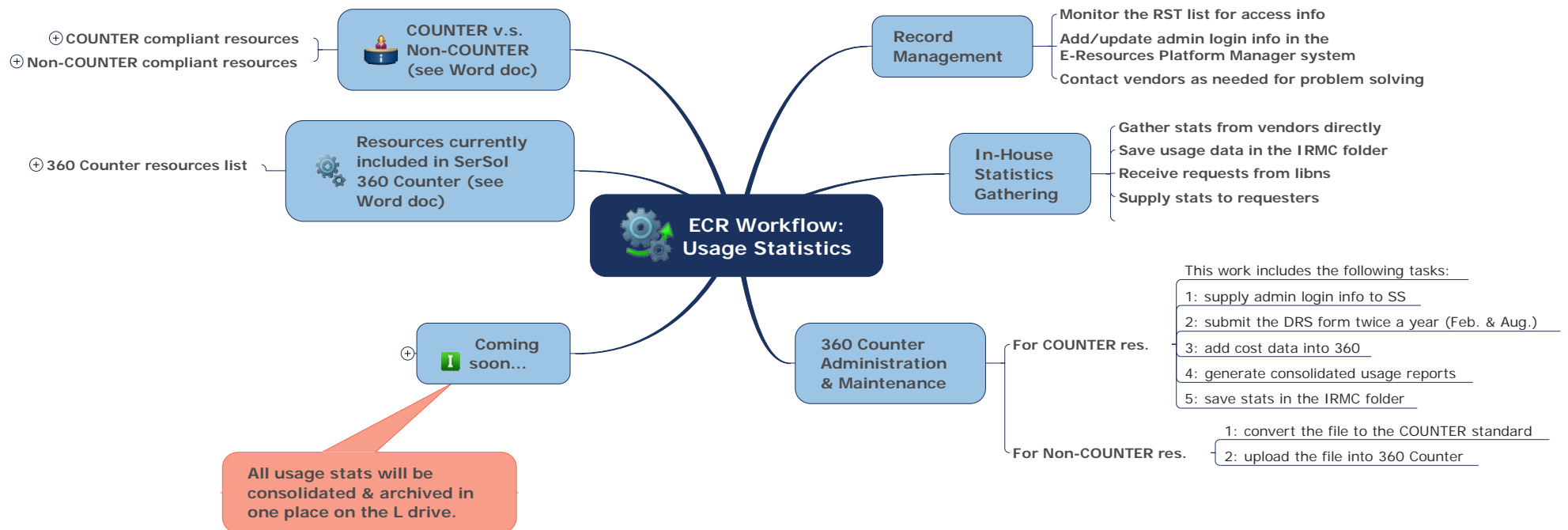
## 5. Management information

Ref no.	Requirement	Notes		Yes/No
5.1	What is the process of notifying floors of purchases			/10
5.2	How is the fund accounting information administered? E.g. frequency of reports etc.			/10
5.3	Provision of usage statistics			/10
5.4	Service and support			/10
		Total as a percentage		

**Here is a list of the top fourteen usual deal breakers for academic institutions when licensing electronic resources:**

- 1. Definition of site does not encompass your institution's geographical situation
- 2. Definition of users allowed to utilize the resource to be purchased: Walk-in users should be allowed to access and use resources purchased by your institution, visiting scholars should be able to access and utilize the resource as well as institutional recognized researchers
- 3. Remote access should be allowed if your users can access your content using remote authentication tool such as a proxy or VPN (virtual private network)
- 4. Access should be IP authenticated as opposed to username/password authentication due to the inability for any institution to manage username/password control for thousands of FTE users and if purchasing e-books then DRM should not preclude any use normally expected via library access such as copying chapters and printing chapters of content
- 5. Ability to provide access and connectivity to other resources using a third party link resolver at the article level and not just at the title level
- 6. Indemnification should be mutual to both parties and not favor one or the other
- 7. Restrictive privacy clauses regarding price and details of the agreement when your institution must follow open record laws of a greater body such as a state, province, or nation
- 8. Usage statistics should be made readily available for the resource and should be reported in COUNTER compliant formats or there should be an intent to provide COUNTER statistics within the first year of the agreement
- 9. Content transfer should be given within sixty (60) days of transfer and if significant content is lost (40% or more) then the purchasing institution should have the right to cancel upon notification
- 10. Ability to use the resource and resource records with third party discovery tools
- 11. If your institution relies heavily on funding revenue outside of the institution such as from a state or national government, you should incorporate a loss of funding out clause. This is explained further below.
- 12. The venue should be applicable to your location and in line with your institution's guidelines
- 13. Ability to maintain perpetual access to content. This is a tricky clause in that journal content shifts so readily from one provider to another that perpetual access is sometimes not honored by the content purchaser. In regards to e-books, perpetual access is still being worked out by most providers. This clause may be fore-gone if the demand for content outweighs the desire to maintain access in perpetuity. Ask for the provider to participate in an archiving scheme such as LOCKSS, CLOCKSS or Portico. Ask for the ability for local authors to load articles into your digital repository as a way to at least maintain local content creation.
- 14. Price cap allowance: You want to make sure you include the ability to cancel if the price increases above a certain amount. Most libraries cannot readily absorb the standard 5%-12% inflation rate on most subscriptions so if a price suddenly jumps by 20%-30%, the resource or suite of resources may need to be canceled. If possible, try to negotiate this purchase term upfront and if signing a contract, make sure to include this in the agreement.

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PO #	Fund	Title	Vendor	Provider/Platform	Call #	2011 Costs	2012 Costs	2013 Costs	Cancel \$	Transfer \$	Impact Factor	Eigenfactor AI	SNIP	Usage 2011	Cost per Use	Selector Comments
o10282646	sph5	American journal of clinical nutrition	s-ebs	Highwire	RC584 .A5	\$508.13	\$534.05	\$560.75			N/A	2.2715	3.107	Asked for	N/A	
o10732688	sph5	American journal of epidemiology	s-ebs	Oxford Journals	RA421	\$725.90	\$762.19	\$800.30			N/A	2.4403	2.519	313	\$2.32	
o1073269x	sph5	American journal of health behavior	s-ebs	Academic Search Complete, Academic OneFile, IngentaConnect,	RA421 .H4184	\$246.81	\$246.81	\$259.15			1.572	0.5677	1.707	34	\$7.26	
o10732718	sph5	American journal of health promotion	s-ebs	highwire	RA427.8 .A43	\$372.28	\$372.28	\$390.89			2.642	0.8968	0.88	195	\$1.91	
o10617516	sph5	Clinical gerontologist	s-ebs	Taylor & Francis Online	RC451.4.A5 C524	\$1,075.37	\$1,005.89		\$1,056.18		1.151	0.304	0.421	7	\$153.62	EH
o1077998x	sph3	Conn's current therapy.	ybp		RM101 .C87	\$89.96	\$89.96		\$94.46		N/A	N/A	N/A	0	\$89.96	EH
o10620278	sph5	Critical public health	s-ebs	Academic Search Complete, Taylor & Francis Online,	RA421 .C754	\$630.50	\$590.05	\$619.55			N/A	N/A	0.677	9	\$70.06	
o10599289	sso2e(50.00%),sph2e(50.00%)	Ethnicity & disease	s-ebs	Single Journals	RA652 .E88	\$144.66	\$141.55	\$148.63			N/A	0.4208	0.339	0	\$144.66	\$297.26 total cost split between sso/sph
o1061736x	sph5	Health education research	s-ebs	Education Full Text, Oxford Journals	RA440.5 .H43	\$988.26	\$1,082.63	\$1,136.76			2.633	0.8713	1.439	313	\$3.16	
o10735021	sph2e	International journal of health services	s-ebs	MetaPress	RA421 .I49	\$416.87	\$445.91	\$468.21			1.131	0.4568	0.716	51	\$8.17	
o10735070	sph5	International journal of sport nutrition and exercise metabolism	s-ebs	Human Kinetics Journals	RC1235 .I515	\$462.50	\$485.32	\$509.59			N/A	0.5434	1.295	1245	\$0.37	
o10735112	sph2e	International quarterly of community health education	s-ebs	MetaPress		\$416.87	\$416.87	\$437.71			N/A	N/A	0.049	21	\$19.85	
o10735483	sph5a	Journal of aging and physical activity	s-ebs	Human Kinetics Journals		\$362.95	\$381.62	\$400.70			2.144	0.604	1.109	89	\$4.08	



o1073627x	sph5	Journal of infectious diseases	s-ebs	JSTOR, Academic Search Complete, Oxford Journals	QR1 .J65	\$739.38	\$759.73	\$797.72			N/A	2.3456	0.109	54	\$13.69	
o10736530	sph5	Journal of nutrition	s-ebs	Highwire	RM214 .J6	\$694.79	\$725.90	\$762.20			N/A	1.2273	1.898	Asked for	N/A	
o10735409	sph5	Journal of physical education, recreation & dance	s-ebs	Academic OneFile, IngentaConnect,	GV201 .J6	\$233.74	\$239.55			\$251.53	N/A	N/A	N/A	New activation for 2012	N/A	Transfer to eed5 per SAB
o1062028x	sph5	Journal of public health policy	s-ebs	Palgrave Journals	RA421 .J92	\$365.93	\$380.28	\$399.29			1.484	0.6924	0.655	100	\$3.66	
o10739063	sph5	Journal of sports medicine and physical fitness	s-ebs	Edizioni Minerva Medica		\$441.96	\$476.40	\$500.22			N/A	0.3028	0.896	New activation for 2012	N/A	
o10644283	sph5	Journals of gerontology. Series B, Psychological sciences and social sciences.	s-ebs	Oxford Journals	HQ1060 .J6 ser. B	\$1,283.81	\$1,348.10	\$1,415.51			2.883	1.0328	2.018	636	\$2.02	
o10644295	sph5	Medicine & science in sports & exercise	s-ebs	Education Full Text, Journals@Ovid Ovid Full Text	RC1200	\$1,156.20	\$1,156.20	\$1,214.01			N/A	N/A	3.006	284	\$4.07	
o11077293	sph5	New solutions	s-ebs	MetaPress		-	\$276.88	\$290.72			N/A	N/A	0.048	New for 2012	N/A	
o10792119	sph3	Physicians' desk reference for nonprescription drugs and dietary supplements.	ybp		RM671.A1 P48	\$107.92	\$59.95	\$62.95			N/A	N/A	N/A	0	\$107.92	
o10737947	sph5	Research quarterly for exercise and sport	s-ebs	Academic OneFile, IngentaConnect,	GV201 .R4	\$289.06	\$285.17	\$299.43			1.662	0.4596	1.131	New activation for 2012	N/A	
o1064376x	sph5	Sports medicine	s-ebs	Academic Search Complete, Academic OneFile, AdisOnline	RC1210 .S67	\$1,788.83	\$1,845.86	\$1,938.15			N/A	1.5319	3.468	42	\$42.59	

\$13,412.44 \$1,150.64 \$251.53

**Marketing Matrix:** Enter actions, responsibilities and timings into the appropriate boxes.

*You are encouraged to modify this table to suit your needs.*

*You are not expected to use all the boxes. If you prefer, list the actions in an Appendix and put their numbers in the matrix.*

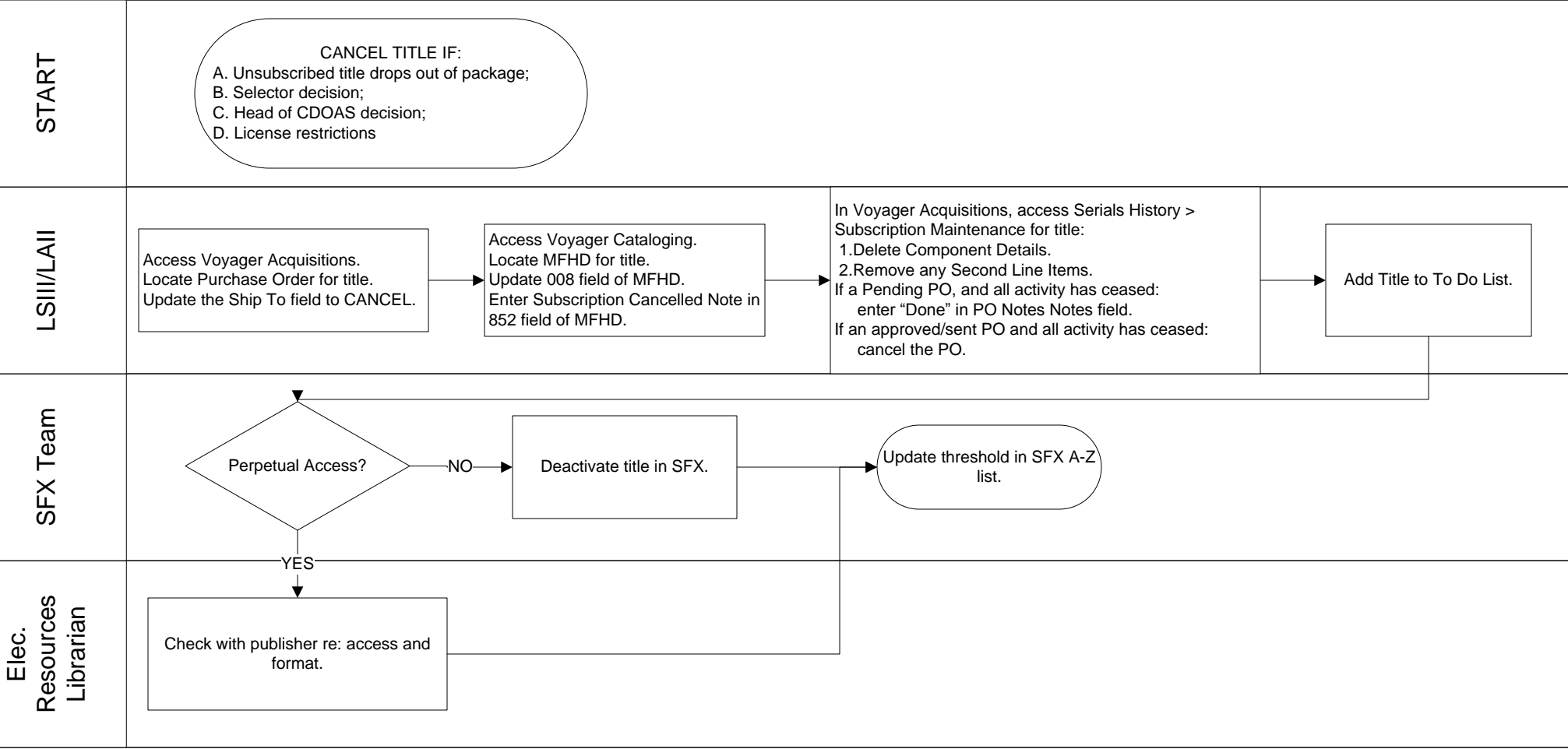
Marketing channel \ Customer group	Undergrads and taught postgrads, part-time and full-time.	Academics and researchers	Support staff including Library staff	Potential members of the University (staff and students)	Members of the public, including visitors and professional community	Users with disabilities		
Website								
Plasma screens								
Email messages								
Text messaging								
LMS/VLE								
Within school/service e.g. posters, roadshow.								
Information skills training								
Undergraduate student induction								
Postgraduate and research student inductions.								
Staff induction								
Portal System								
Newsletters								
Interaction with Student Union								
Fact sheets								

Marketing channel \ Customer group	Undergrads and taught postgrads, part-time and full-time.	Academics and researchers	Support staff including Library staff	Potential members of the University (staff and students)	Members of the public, including visitors and professional community	Users with disabilities		
Leaflets and bookmarks								
Local press								
Student newspaper								
Exhibitions								
Displays – temporary								
Displays – permanent								
Notice boards								
University publications (including prospectuses and handbooks)								
Via contacts with public library services								
Press releases								
Presentations								
Internal University conferences								
Via Marketing Director								
Via Schools and Colleges Liaison Service								
Via University PR function								
Blog								

Marketing channel \ Customer group	Undergrads and taught postgrads, part-time and full-time.	Academics and researchers	Support staff including Library staff	Potential members of the University (staff and students)	Members of the public, including visitors and professional community	Users with disabilities		
University Facebook page								
University Twitter account								
Library Twitter account								
Via staff meetings								
Staff Briefing								
Via University committees								
Via Student Panels/Course Committees								
Staff Bulletin								
Library seminar/workshop								

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# Cancellation of an E-Journal



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